

YUGOV SURVEY OF EUROPEAN GAMERS SHOWS HOW SONY CANNOT BE FORECLOSED



February 2023

KEYSTONE

CRA Charles River
Associates

Overview – YouGov survey confirms that Sony cannot be foreclosed

1 Microsoft commissioned YouGov to undertake a new survey of gamers' choices

- YouGov's survey samples gamers across any console and game title played.
- YouGov polled **7,640 console gamers in five different countries in the EU (Germany, Spain, France, Italy, Poland).**

- The YouGov survey allows to draw conclusions about the potential impact of withholding content, **without the need for additional data.**

2 YouGov survey confirms that Sony cannot be foreclose by the withholding of Call of Duty

- If post deal Microsoft were to withhold Call of Duty ("**CoD**") from PlayStation ("**PS**"),
 - Only **~3% of existing PS gamers would have considered switching to Xbox** at their last console purchase
 - Only **5% of gamers planning to purchase a PS would purchase an Xbox in the future** instead of their planned console purchase.
- The dominant console platform cannot be foreclosed by such small numbers – especially given the long list of assets at its disposal for a counter strategy.

YouGov survey finds that Sony cannot be foreclosed by withholding CoD.

Overview – Survey also confirms that Call of Duty is not “special”

3

CoD availability is no more important to PlayStation gamers than that of other games.

The EC argues that Sony would not be able to retain its users if it lost CoD as CoD is irreplaceable.

The YouGov survey shows this is not the case.

Gamers of other games (FIFA, Fortnite, etc.) all report they would divert in greater/similar numbers than CoD gamers if their game was withheld. CoD is not a driver for console adoption any more than other titles are.

- Sony’s existing popular exclusives (Spider Man, The Last of Us) provide powerful incentives to gamers not to leave PS in response
- Sony **could mitigate any diversion to Xbox by signing additional exclusivity agreements for other multi-console titles.**

4

PS gamers are more “loyal” to their consoles than Xbox gamers.

- **74% of PlayStation gamers plan on purchasing a PlayStation next as opposed to only 44% of Xbox owners who plan on purchasing an Xbox next**
- Xbox CoD gamers anticipate higher diversion levels than CoD PlayStation gamers.
- **As the dominant player, Sony can have greater impact through exclusives than Xbox.**
- Sony’s larger number of exclusives will more than offset the impact of any hypothetical withholding of CoD.

The YouGov survey shows that CoD is not more important than other games.

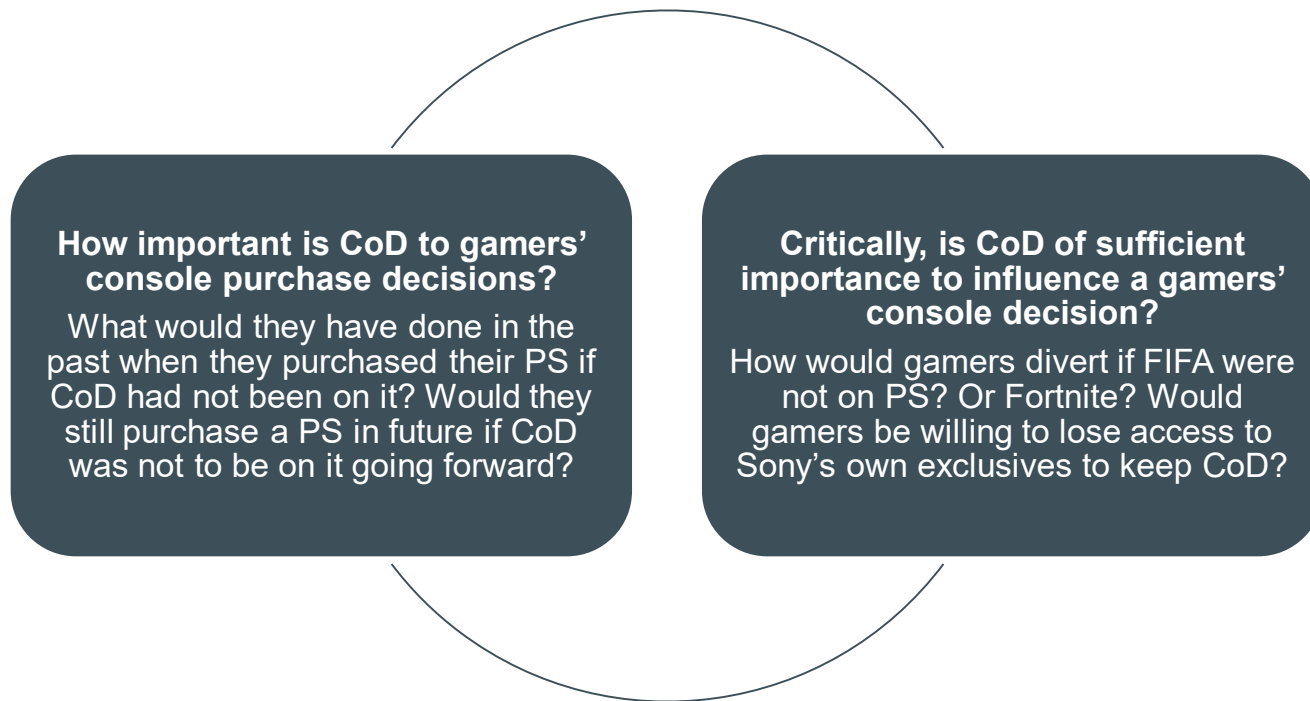
The YouGov survey of console gamers in Europe



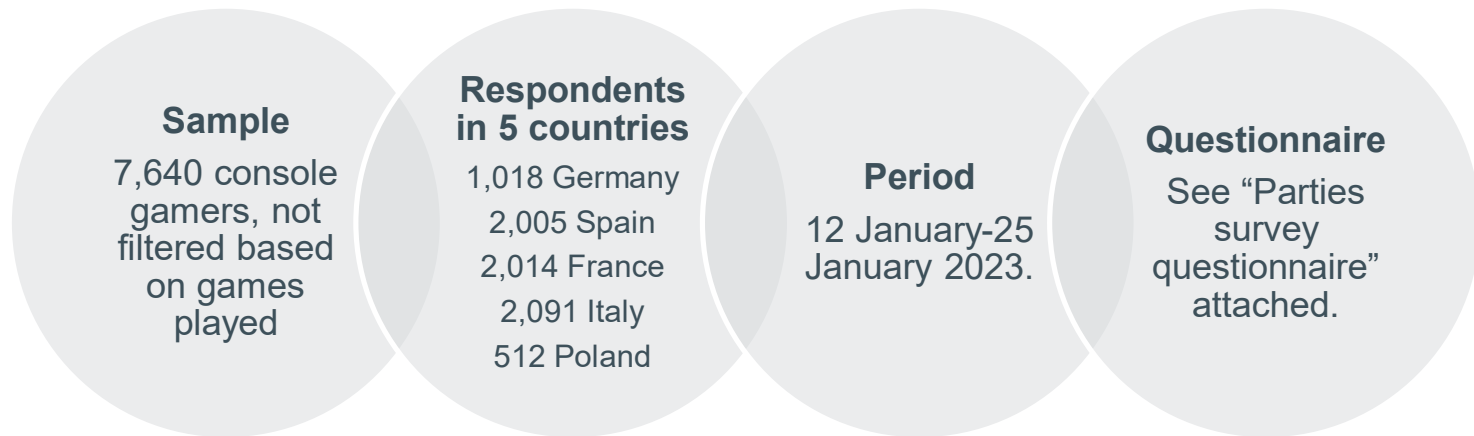
The YouGov survey is designed to look at the impact of *any* game on gamers' choice of console

The YouGov sample considers all console gamers and investigates the impact of **CoD** as **well as other games** on gamers' choice across all available consoles.

It sheds light on two key questions which are central to the EC's theories of harm:



Methodology and scope

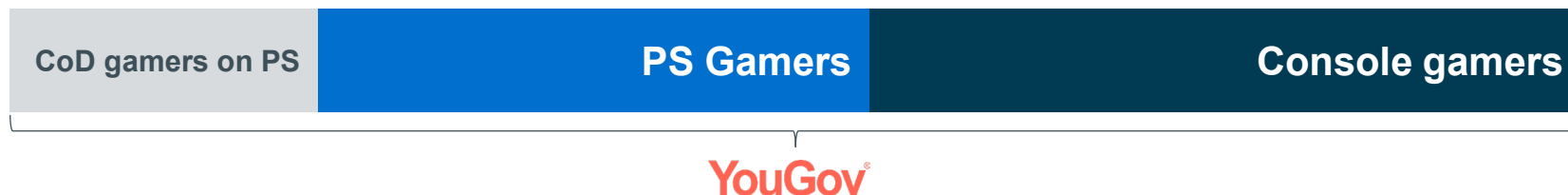


Diversion estimation: the survey asks gamers what are the favourite games they play on their most used console. For the first and second-ranked games, gamers were asked:

1. Past Diversion: Thinking back about their latest console purchase, what would they have done if their favourite (or 2nd most favourite) game had not been available on the console they purchased?
2. Future Diversion: Would they change their planned console purchase (if they have one) if future releases of their favourite (or 2nd most favourite) game will not be available on the console the plan on purchasing?

**The YouGov survey confirms that
Sony cannot be foreclosed**

YouGov survey allows us to compute diversion in terms of overall PS users without additional assumptions



The YouGov survey polled *all* console gamers including PS gamers who do not play CoD at all.

- This allows one to compute the share of all PS gamers who play CoD and estimate a diversion on the overall PS user base,
- Without the need to make assumptions about how representative of the PS gamer population the respondents are.

The YouGov survey implies that at most ~3% of *all* PS gamers could have switched to Xbox at the time they bought their PS if CoD had not been available on Sony's console.

The YouGov survey confirms that if CoD had not been on PS, PS could have foregone at most ~3% of its past console sales

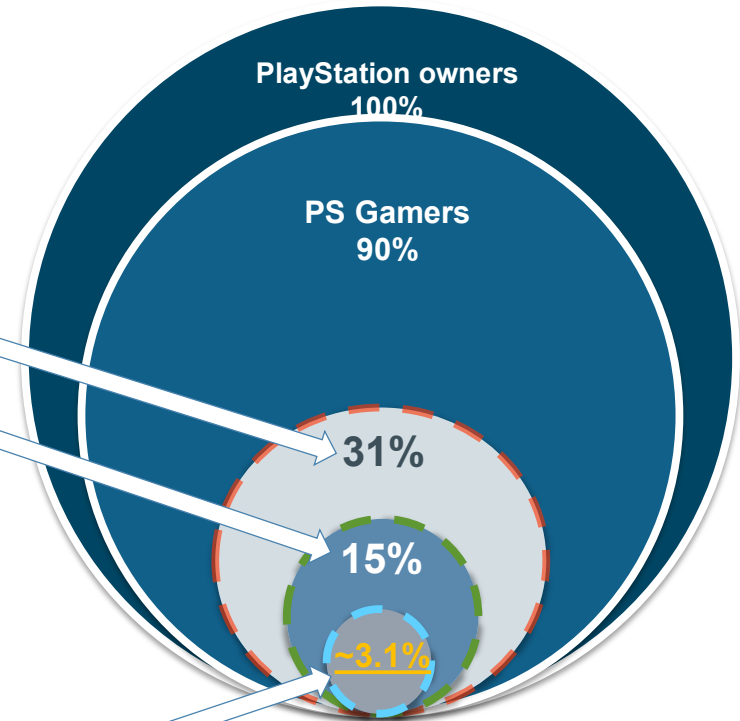
The YouGov survey includes data on:

- Total number of PS owners: 5587*
- Gamers reporting PS as their “most used console” (“PS Gamers”): 5054 (90%)
- PS Owners who play CoD: 1711 (31%)
- PS Owners who rank CoD most or second most favourite game: 846 (15%)

10.4% of PS gamers who ranked CoD as their most favourite game or runner up, would have purchased an Xbox *instead* of a PlayStation if CoD were not available on PS at the time of their last console purchase.

Assuming similar adoption levels and diversion ratios across other PS owners (see annex) we get:

- PS Owners switching to Xbox if CoD was not on PS: 175



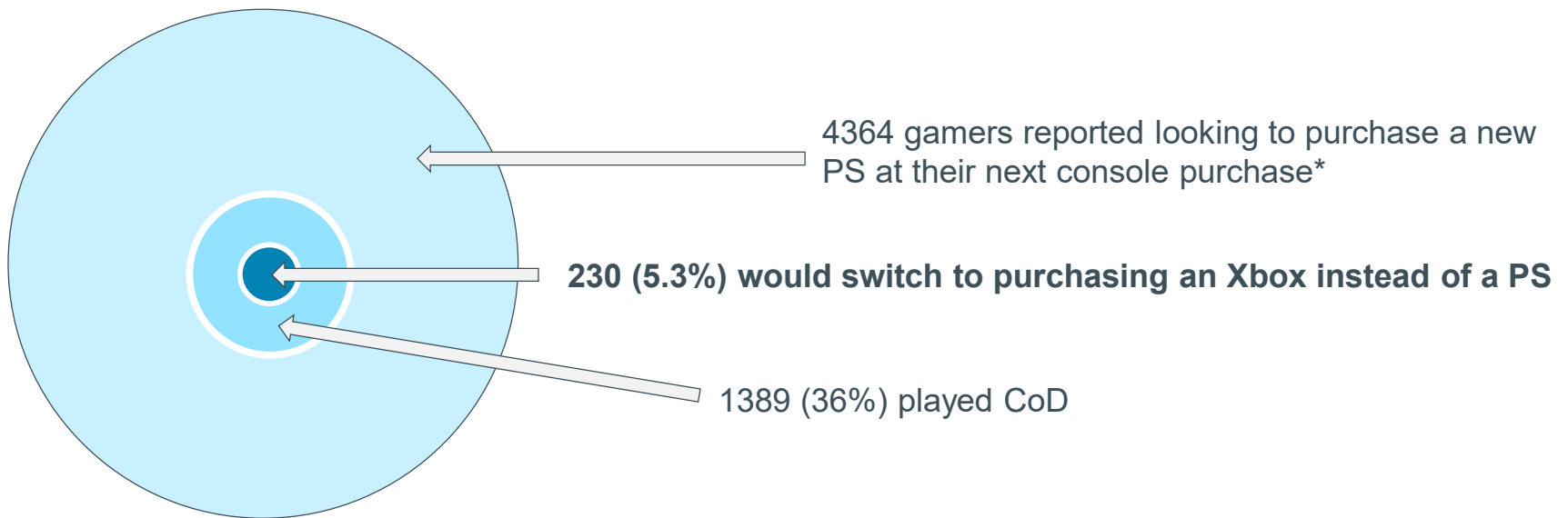
Diversion ratio in terms of all PS owners = $175/5587 = 3.1\%$

**Exclude PS Owners who said they would not know how to react to CoD not on PS. See Annex for more details on the methodology.*

Foreclosure is only slightly more likely in terms of future purchases

The YouGov survey is more informative as to how the withholding of CoD would impact Sony.

The YouGov survey further asked respondents: **if Microsoft were to withhold CoD today (or in 2024 when the Sony/Activision agreements end) how many existing and prospective PlayStation owners would buy an Xbox at their next planned console purchase instead?**



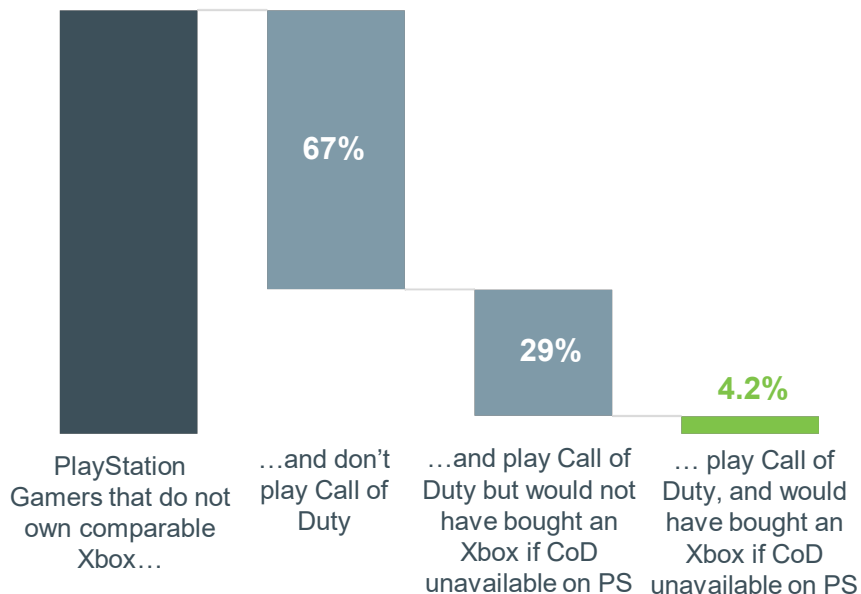
Of those PS gamers who reported planning to purchase a PlayStation at their next major console purchase, 5.3% reported they would buy an Xbox instead

**Excludes gamers who said they would not know how to react to CoD not on PS. See Annex for more details on the methodology.*

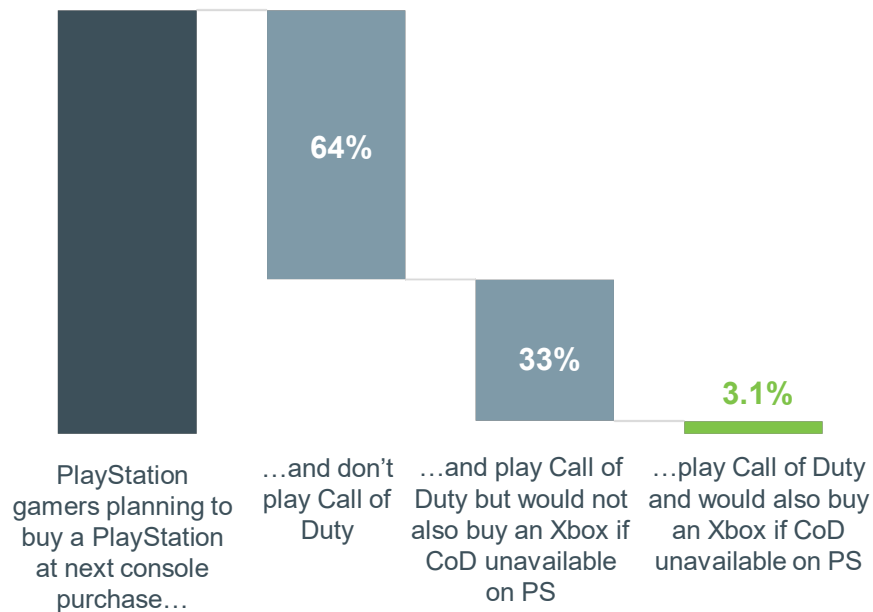
Some PlayStation gamers would multi-home, not switch, in response to a theoretical withholding of CoD. But this would have little impact on Sony.

If Call of Duty were not on PlayStation...

4.2% of PlayStation gamers would have bought also an Xbox in the past



3.1% of gamers planning to purchase a PlayStation would also buy an Xbox in the future



Multihomers do not abandon their PlayStation devices – on the contrary, most are likely to continue using PS as their main device. Therefore, any impact on Sony from multihoming would be even lower.

*By "comparable" Xbox is meant an Xbox of the same or a more recent generation

**The YouGov survey confirms that
no single game can foreclose a
platform and there's nothing
“special” about CoD when it
comes to console choice**

The YouGov survey shows that CoD is not important to console choice

The EC's concern is predicated on the idea that CoD is more important than other games and that PS gamers would switch as a result of its absence from Sony's platform.

The YouGov survey is designed to provide a comprehensive assessment of the importance of CoD to console choice. In particular:

1. **Discovers gamers preferences by asking for them as part of the survey responses instead of prescreening for CoD-dedicated PS players.**
 - Responses show that **PS gamers prefer FIFA to CoD**. 33% of PS gamers ranked FIFA as their most or 2nd most preferred game vs 17% for CoD
 - Other games were viewed as similarly important: Fortnite 14%, Assassin's Creed 12%, GTA 11%, God of War 10%
2. **Assesses whether CoD users are more “loyal” than other gamers**
 - Responses show that CoD availability for gamers who favor CoD is no more important to their choice of console than those who favor CoD than other titles.
 - CoD induces the 2nd/3rd largest diversion across all titles when combining all respondents across different countries.
 - COD is not even in the top 5 games by largest diversion in many of the country-specific rankings. **Other shooters – Apex Legends, Fortnite, Battlefield – “perform” better than COD. In Germany, CoD induces the 12th largest diversion and in Poland the 16th.**

No single game can foreclose a gaming platform

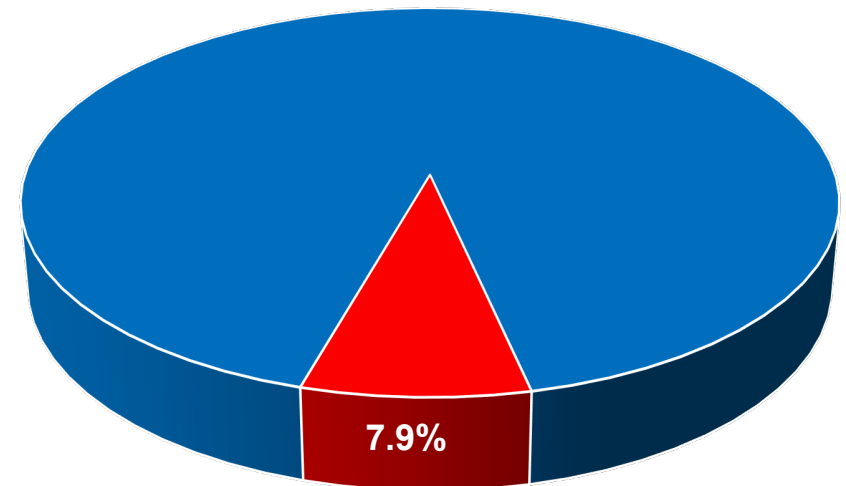
The YouGov survey asked about the extent to which the availability of any game drives choice of console.

The responses showed that individual games have minimal impact on console choice. Of the top seven games ranked as most or second most favourite, **no title would lead to significant levels of diversion from PS** if they were not distributed on the Sony console.



1. **The most popular game on PS is FIFA**
1,180 PS gamers ranked it as their most preferred game.
2. **FIFA leads to the highest diversion**
Both in case of past (6.4%) and future (7.9%) console purchases.

**No console can be foreclosed by losing
~8% of its past or future sales**



Switchers if FIFA not on PlayStation

There's nothing "special" about CoD

Other games lead to similar degrees of diversion – Past Diversion

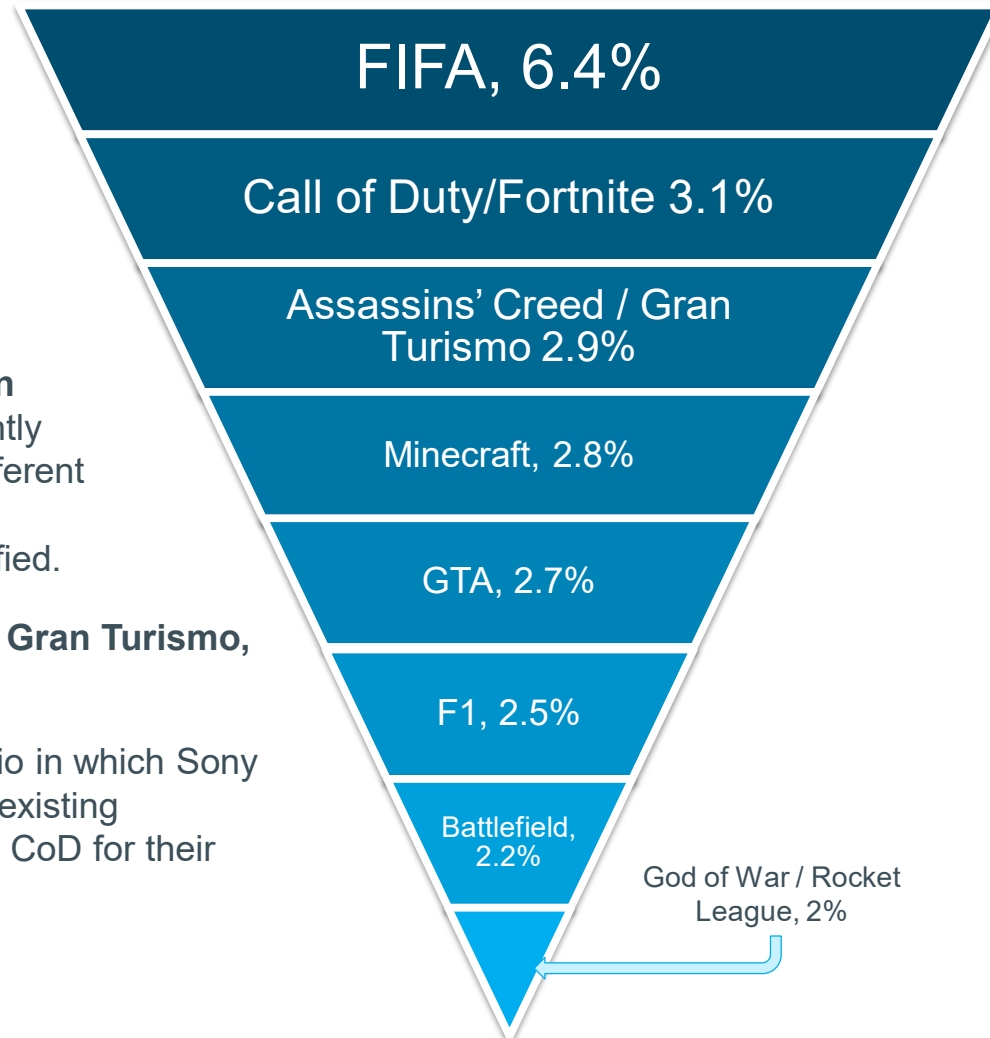
Gamers "follow" their favourite games with similar intensity. When asked about what they would have done at their last console purchase if their favourite game was not on PS, PS owners reported similar levels of diversion.

Analysing data by country shows huge variability in top games in terms of diversion ratios. FIFA is the only game ranking consistently top 1. Call of Duty ranges from 2nd to 16th in different countries, in line with other popular games like Fortnite, Horizon, and Grand Theft Auto, Battlefied.

Call of Duty is in range of Sony's exclusive: Gran Turismo, Horizon, and God of War.

In other words, even in the hypothetical scenario in which Sony lost CoD, PS gamers would value some of the existing exclusives as important or more important than CoD for their console choice. They would hardly switch.

Past diversion of all PS gamers were the game not on PS



Data by country shows significant variation in top diversion rates. CoD ranks low in most countries in terms of induced past diversion

Germany

FIFA, 5.3%

Battlefield, 4.7%

NBA 2K, 4.3%

Apex Legends, 3.4%

Horizon & Minecraft, 3.2%

Assassin's Creed, 3.1%

GTA, 2.9%

Call of Duty, 2% (ranks 13th)

France

FIFA, 5.2%

Fortnite, 4.4%

GTA, 4.1%

Call of Duty, 3.9%

F1, 3.8%

Gran Turismo, 2.8%

Rocket League, 2.6%

Poland

FIFA, 11.5%

Horizon, 9.1%

Minecraft, 8.1%

Overwatch, 6.8%

F1, 6.1%

Fortnite, 5.8%

Battlefield, 4.2%

Call of Duty, 2.7% (ranks 16th)

Italy

FIFA, 7.4%

Fortnite, 3.8%

Assassin's Creed, 3.7%

Gran Turismo, 3.1%

Call of Duty, 2.8%

F1 & Minecraft, 2.7%

GTA, 2.2%

Spain

FIFA, 5.4%

Call of Duty, 3.5%

God of War, 3.2%

Gran Turismo, 3.1%

Far Cry, 2.6%

Resident Evil, 2.5%

Battlefield, 2.4%

Other games lead to similar degrees of diversion also with respect to future diversion

Game	% of all PS users
FIFA	7.9%
Call of Duty	5.3%
Fortnite	4%
Gran Turismo	3.9%
Minecraft	3.5%
Far Cry, Grand Theft Auto	3.3%
NBA 2K	2.7%
Assassin's Creed	2.4%

Gamers generally predicted higher diversion rates when reporting future purchase intentions.

1. **Confirms the view that no single title will influence future console choice.**
2. **CoD remains far from the top.** 2nd with 2.6 percentage points below FIFA.
3. **Per country analysis shows important variability.** CoD remains in the pack, in range with Sony's exclusives.
4. **FIFA remains ahead.** Fortnite and other games are in range.

Again, country specific diversion rankings see CoD lower with the pack

Germany

Game	% of all PS users
NBA 2K	6.6%
FIFA	6.5%
Minecraft	6%
GTA	5%
Diablo	4.9%
Fortnite	4.4%
Gran Turismo	3.6%
Horizon	3.3%

(Call of Duty ranked 9th with 3.1%)

France

Game	% of all PS users
FIFA	7.5%
Call of Duty	7.5%
Gran Turismo	5.1%
GTA	3.5%
NBA 2K	3.2%
Minecraft	3%
Fortnite	2.7%
F1	2.4%

Poland

Game	% of all PS users
FIFA	11.3%
Gran Turismo	9.7%
Call of Duty	8.7%
Far Cry	8.7%
Horizon	8.2%
Overwatch	7.1%
The Witcher	6.9%
Fortnite	5.7%

Italy

Game	% of all PS users
FIFA	9.2%
Fortnite	5.9%
F1	3.6%
Call of Duty	3.5%
Gran Turismo	3.4%
Far Cry	3.4%
Assassin's Creed	3.3%
Minecraft	2.9%

Spain

Game	% of all PS users
FIFA	7%
Call of Duty	5.5%
Gran Turismo	3.3%
Far Cry	3.1%
GTA	3%
The Last of Us	2.8%
Assassin's Creed	2.6%
Overwatch	2.5%

**PlayStation gamers are
particularly loyal to their console**

PlayStation gamers exhibit higher loyalty than Xbox

Diversion ratios for the most successful games in the survey are generally higher among Xbox gamers than on PS gamers for the past diversions .



- **This is especially the case for CoD.** Diversion on PlayStation is half the diversion on Xbox for past diversion

PlayStation has a historically broader range of exclusive content, more powerful and better designed HW. Generation over generation Sony built a level of brand loyalty that Xbox cannot replicate.

- **Sony gamers are harder to “divert” than Xbox gamers.**

Game	“Past” diversion		“Future” diversion	
	PlayStation	Xbox	PlayStation	Xbox
FIFA	6.4%	7.8%	7.9%	6.3%
Call of Duty	3.1%	7.4%	5.3%	7.4%
Fortnite	3.1%	5.2%	4.0%	2.8%
Assassins’ Creed	2.9%	5.7%	2.4%	2.0%
Minecraft	2.8%	3.7%	3.5%	4.3%
Grand Theft Auto	2.7%	1.6%	3.3%	1.8%
F1	2.5%	3.5%	2.1%	4.2%
Battlefield	2.2%	5.0%	1.5%	3.0%
Rocket League	2.0%	2.7%	1.7%	5.1%
Far Cry	1.9%	1.8%	3.3%	N/A*
Avg. across all games	2.1%	3.8%	2.6%	3.3%

The lower degree of switching for PlayStation is consistent with gamers' loyalty to their existing console

	Currently Most Played console (CMU)	Planned Next Purchase	% of total CMU
<p>The set of PlayStation gamers in the survey who plans on purchasing another PlayStation at their next console purchase is 74%</p> 	PlayStation	PS5	27%
		Next upgraded version of PS5	22%
		Next Gen PS	16%
		PS (not sure which version)	9%
<p>The set of Xbox gamers in the survey who plans on purchasing another Xbox at their next console purchase is 44%</p> 	Xbox	Xbox Series S X	13%
		Next upgraded version of Xbox Series S X	15%
		Xbox Series S X	11%
		Next upgraded version of Xbox Series S X	4%

Annex 1 – More details on methodology

Diversion ratios – Definitions

As discussed in the main body, the YouGov survey asks diversion questions across the following dimensions

- Timing of the hypothetical scenario: Either looking back on past purchase (**Past Diversion**) or looking forward to next purchase (**Future Diversion**).
- Starting console: i.e., the console the gamer would be diverting from.
 - For Past Diversion we look at the **Currently Most Used (“CMU”)** console – this is the same as the sole console owned for single owners and the console they reported more gametime hours for in the case of multihomers.
 - For Future Diversion we look at the **Planned Next Purchase (“PNP”)** – this is the console the gamer reports as intending to purchase next. Gamers have the option to say they do not plan on purchasing another console, in which case they are not considered in the context of Future Diversion.
- Type of diversion:
 - The key metric for a foreclosure concern is how many gamers would have purchased/will purchase an Xbox as opposed to a PlayStation if CoD were not available. This is defined as **Switching**.
 - We then look at gamers who would have **Multihomed**, i.e., purchasing a different console as well as their past/planned next purchase.

We calculated diversion rates for all games reported as either most or second most preferred title.

Diversion ratios – Past Diversion questions

Past Diversion

Questions below were asked for both Rank 1 and Rank 2 games

Q15: For the following question, please imagine that the latest release of \$rankedFirst was not available on the \$CCG_Q1pipe when you were deciding which console to purchase, but was available on \$differentBrand and on PC. Which ONE of the following BEST describes what you would be most likely to do? (Please select the option that best applies)

Q19 (for Live Service Games): For the following question, please imagine that new content updates (e.g. expansions, downloadable content “DLC”, new campaigns) for \$rankedFirst were not available on the \$CCG_Q1pipe when you were deciding which console to purchase, but were available on \$differentBrand and on PC. Which ONE of the following BEST describes what you would be most likely to do? (Please select the option that best applies)

Response options: i) I would still purchase my current most used console; ii) I would purchase another device; iii) I would purchase my current most used console AND another device; iv) I would not purchase any device; v) Other (please specify); vi) Don't know.

Q16: You previously said that if the latest release of \$rankedFirst was not available on \$CCG_Q1pipe when you were deciding which console to purchase, you would purchase another device. Which ONE, if any, of the following devices would you have been MOST likely to purchase?

Response options: Sony PlayStation 4 (PS4) (retails at 399.99 €), Microsoft Xbox One S (retails at 399.99 €), Sony PlayStation 4 (PS4 Slim) (retails at 299.99 €), Microsoft Xbox One X (retails at 499.99 €), Sony PlayStation 4 (PS4 Pro) (retails at 349.99 €), Nintendo Switch (retails at 329.99 €), Sony PlayStation 5 (retails at 499.99 €), Nintendo Switch Lite (retails at 229.99 €), Microsoft Xbox Series S (retails at 249.00 €), Microsoft Xbox Series X (retails at 424.00 €), Don't know, Microsoft Xbox One (retails at 599.99 €), Other (please specify).

List of games (Live Service are market as *)

- Animal Crossing, Apex Legends*, Assassin's Creed, Battlefield, CoD, Diablo*, Elden Ring, F1, Far Cry, FIFA, Fortnite*, Forza, Gears, God of War, Gran Turismo, GTA*, Halo, Horizon, Madden, Mario, Marvel's Spider-Man, Minecraft*, Monster Hunter, NBA 2K, Overwatch*, Pokémon, Ratchet & Clank, Red Dead Redemption*, Resident Evil, Ring Fit Adventure, Roblox*, Rocket League*, The Last of Us, The Witcher, Zelda.

Diversion ratios – Future Diversion questions

Future Diversion

Q31: Which ONE, if any, of the following devices do you think you are **most** likely to buy as your next **main** gaming console? (Please select the option that best applies)

Questions below were asked for both Rank 1 and Rank 2 games

Q32: Now think about when the time comes to buy your new main gaming console... For the following question, please imagine that in the near future new releases of \$rankedFirst are not going to be available on the \$CCG_Q31pipe, but are available on \$differentBrand1 and PC. Which ONE of the following BEST describes what you would be most likely to do? (Please select the option that best applies)

Q40 (for Live Service Games): Now think about when the time comes to buy your new main gaming console... For the following question, please imagine that in the near future content updates (e.g. expansions, downloadable content “DLC”, new campaigns, etc.) of \$rankedFirst are not going to be available on the \$CCG_Q31pipe, but are available on \$differentBrand1 and PC. Which ONE of the following BEST describes what you would be most likely to do? (Please select the option that best applies)

Response options : i) I would still purchase my current most used console; ii) I would purchase another device; iii) I would purchase my current most used console AND another device; iv) I would not purchase any device; v) Other (please specify); vi) Don't know.

Q33: You previously said that if when the time comes to buy your new main gaming console, new releases of \$rankedFirst are not going to be available on the \$CCG_Q31pipe, you would purchase another device. Which ONE, if any, of the following devices would you MOST likely purchase? (Please select the option that best applies)

Response options: [same as with past diversion questions]

List of games: [same as with past diversion questions]

Diversion Ratio – Treatment of “Don’t Knows” is in line with CMA guidelines

Diversion ratios are computed in line with the CMA guidelines for “Good practice in the design and presentation of customer survey evidence in merge” available at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/708169/Survey_good_practice.pdf

In particular we

1. **Exclude** gamers who reported “don’t know” in response to the diversion questions from the denominator
 - This is in line with paragraph 4.23: *“Don’t know’ responses need to be considered very carefully. A response of don’t know to the main (first) diversion question usually means that the respondent is not asked any further questions relating to that hypothetical scenario and the response is not informative for the purpose of the diversion ratio calculation. Therefore, it can be ignored for this purpose and should not be included in the denominator of the calculation”*
2. **Reallocate** gamers who responded “don’t know” when asked which console, they would divert to when switching away from PlayStation
 - This is line with the formula a paragraph 4.13 and the formula described therein. We note that *in principle* one could also reallocate the “other (please specify)” responses. While we do not do this in the main body of this document, we note that only a minimal share of respondents selected this option – e.g., only 4 for CoD

Diversion ratios – Extend diversion to full PS owners (1/2)

Diversion questions for each game are asked to gamers who report the game as their first or second most preferred title. For example, past diversion questions for CoD for PS gamers are asked to gamers who:

1. Report PS as their CMU**
2. Report CoD as their most or second most preferred game

To extend this to the overall set of PS gamers we need to extend this to include

1. Gamers who report playing CoD but do not rank it as their most or 2nd most preferred game.
 - a. Assume these would switch to Xbox in the same proportion of those ranking CoD second most preferred title. This is conservative as likely these gamers would have an even lower propensity to divert.
2. PS owners with CMU not qual to PS. For these we assume that:
 - a. Those who play CoD on Xbox would not play it on PS.
 - b. Those who do *not* play CoD on Xbox, and those who have CMU=Nintendo, would play CoD on PS in the same proportion as those reporting CMU=PS.
 - c. We assume these would switch to Xbox in the same proportion of those ranking CoD second most preferred title.

***When there is a tie in reported hours played on given consoles, YouGov started the survey selecting the first CMU the option available in the console list. Later in the survey, YouGov broke the tie in favor of Nintendo consoles to have a more balanced distribution. Thus at times, this tie-breaking scheme selected PlayStation over Xbox and Nintendo, and older consoles over newer ones (i.e., PS4 over PS5), and at other times this is reversed.*

Diversion ratios – Example

Formula	Datapoint	Data
[0]	PS owners	5761
[1]	PS=CMU	5054
[2] = [0] – [1]	PS Owners with CMU not PS	707
[3]	PS=CMU CoD ranked 1st	475
[4]	PS=CMU CoD ranked 2nd	371
[5]	PS=CMU CoD owned but no ranked in top 2	865
[6] = ([3] + [4] + [5])/[1]	CoD adoption rate among CMU users	34%
[7]	PS=CMU, CoD ranked 1st, but responded "don't know" to diversion questions	47
[8]	PS=CMU, CoD ranked 2nd, but responded "don't know" to diversion questions	38
[9] = [1] - [7] - [8] - [5] * ([8] / [4])	Estimated PS=CMU, excluding "don't know" responses to diversion questions	4880
[10] = ([16] + [18])/([3] + [4] - [7] - [8])	PS=CMU, CoD ranked 1st or 2nd, would switch to Xbox	10.4%
[11]	CoD ranked 1st & would switch console	59
[12]	CoD ranked 2nd & would switch console	41
[13]	CoD ranked 1st & would switch console, but don't know which	8
[14]	CoD ranked 2nd & would switch console, but don't know which	5
[15]	CoD ranked 1st & would switch to Xbox	45
[16] = [15] + [13] * ([15] / ([11] - [13]))	Reallocated CoD ranked 1st & switch to Xbox	52.06
[17]	CoD ranked 2nd & would switch to Xbox	24
[18] = [17] + [14] * ([17] / ([12] - [14]))	Reallocated CoD ranked 2nd & switch to Xbox	27.33
[19] = [5] * [18] / ([4] - [8])	PS=CMU, CoD not ranked top 2 reallocated switchers	71
[20] = [2] * [6] * [10]	Estimated switchers among PS not CMU	24.97
[21] = ([20] + [19] + [18] + [16]) / ([2] + [9])	% of PlayStation users who would have switched to Xbox	3.14%

Annex 2 – Other results and extensions

Partial withholding leads to even lower diversion ratios. Foreclosure is, once again, not possible

Along with questions in relation to the full withholding of CoD, the Survey also asked gamers how they would have reacted if their game were still available on their preferred device but with “less content”.

1. The survey asks gamers how important to them are certain “in-game aspects” such as: Cosmetic virtual goods (e.g., Skins, mounts, avatars etc), power upgrades (stronger weapons, equipment, etc), additional playable character/vehicles, additional maps/quests/campaigns/tracks, and XP boosts.
2. Gamers are asked how much they spend on these add-ons in the last 12 months prior the survey.
3. The survey asks gamers what they would do if the in-game aspect they selected would not be available any longer.

Partial foreclosure diversion is generally lower than the diversion levels estimated for complete withholding of Call of Duty. Foreclosure of Sony through partial withholding is even less likely

Share of PS owners that would purchase an Xbox if CoD was not on PS	
Complete withholding – past diversion	3.1%
Complete withholding – future diversion	5.3%
Partial withholding	<u>2.6%</u>

Diversion Ratio for Nintendo games

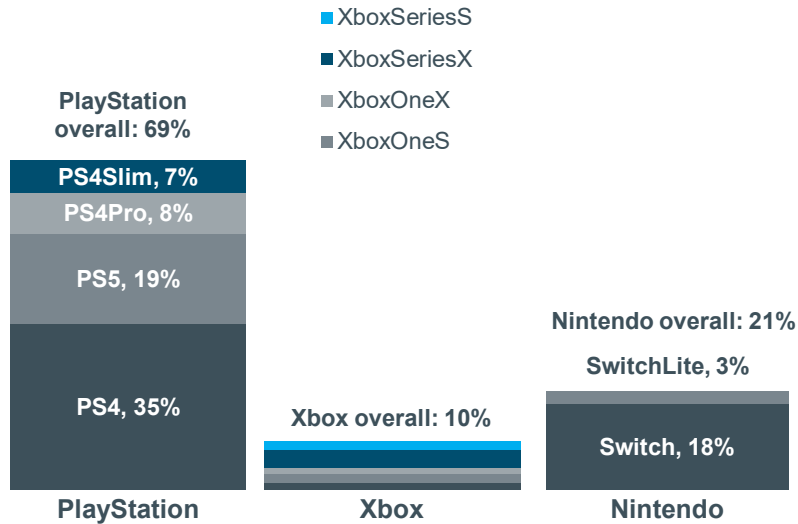
Sampling for gamers with Nintendo as CMU is affected by the scripting issue discussed above. The diversion ratios for the games covered is in line with the rest of the titles.

Game	Past diversion as % of all Switch users	Future diversion as % of all Switch users
Animal Crossing	1.1%	2.4%
Super Mario	1.3%	1.8%
Legend of Zelda	0.8%	1.1%
Fortnite	0.7%	1.4%
Pokémon	1%	1.2%

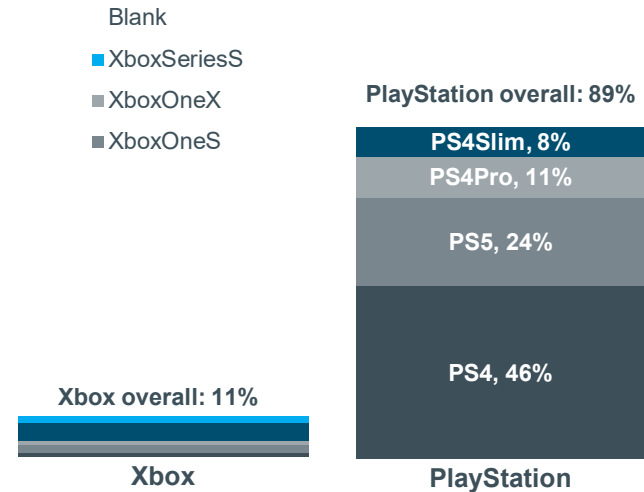
Annex 3 – Console ownership

Distribution of console most-used by respondents

Share of respondents by most used console



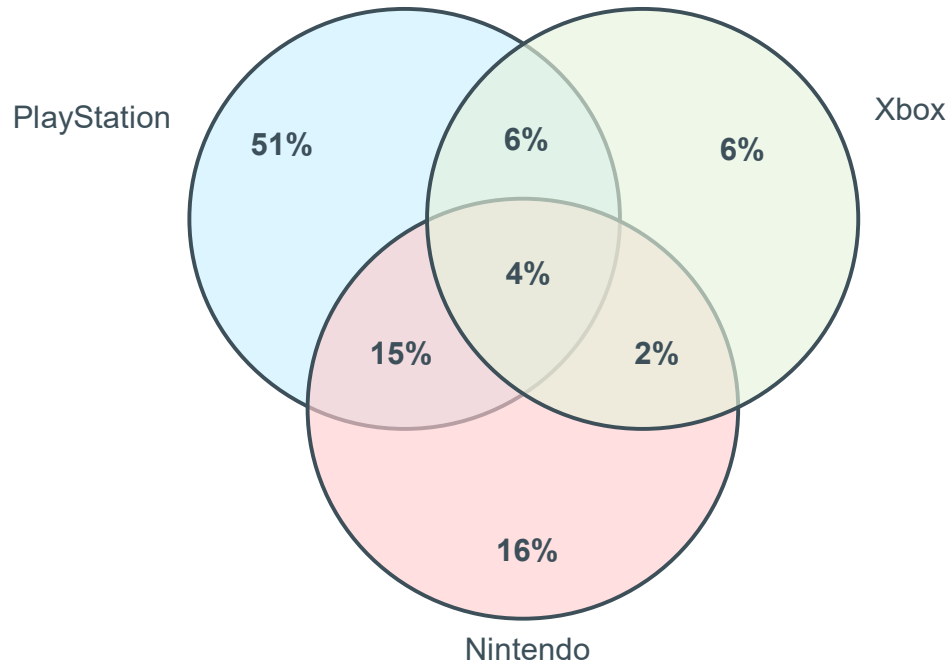
Current most-used consoles among respondents who report Call of Duty as their favorite or second-favorite game



Questions: Approximately, how many hours, if any, do you spend playing video games on each of the following consoles in a typical week? (Please type your answer(s) in the boxes below. If you are unsure, please provide your best estimate);

Thinking about the games that you play on the [most used console]... Please rank your top 5 favourite games that you play on [most-played device] from the list below. (Please rank the options from 1 to 5 below. If you do not play 5 games, please only rank the options you play)

Single-homing and multi-homing across consoles



- Use of a console was defined by respondents indicating that they spent a positive amount of time playing on a given console in a “typical” week
- Gamers who multi-home are indicated by the overlapping portions

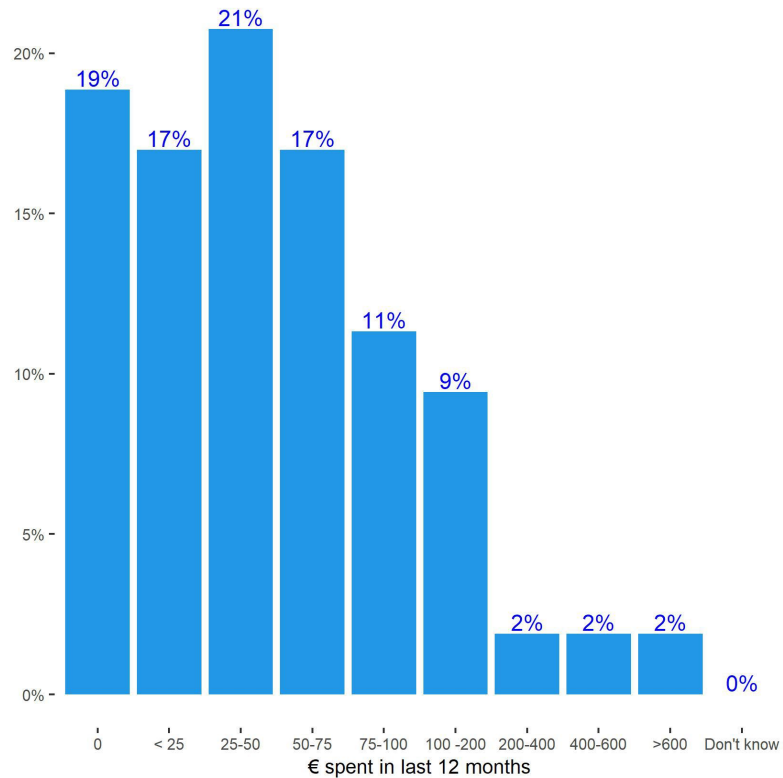
Question: Approximately, how many hours, if any, do you spend playing video games on each of the following consoles in a typical week? (Please type your answer(s) in the boxes below. If you are unsure, please provide your best estimate)

Annex 4 – spending and gametime habits for major games

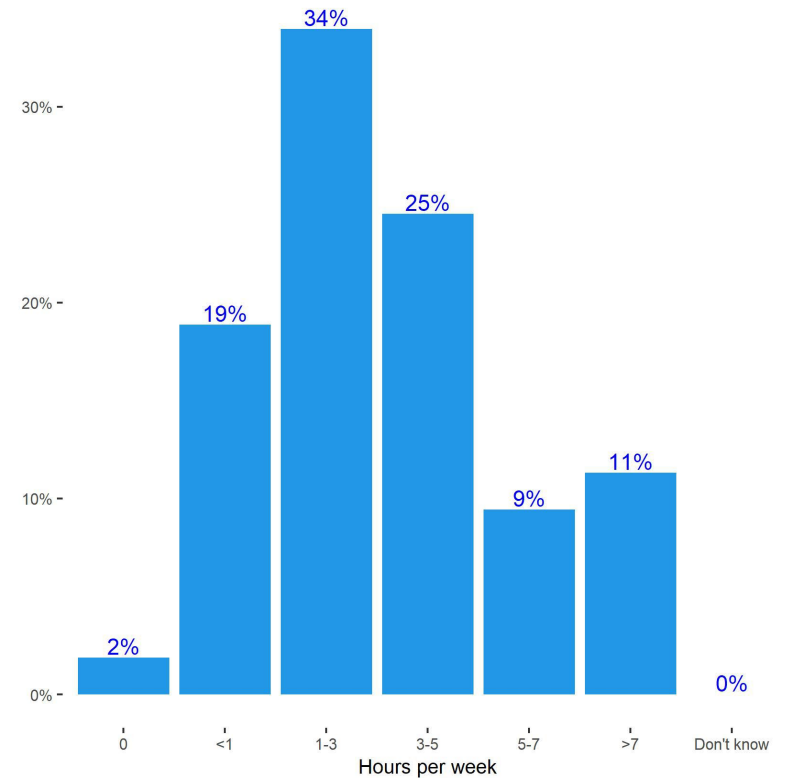
**(in-game spending only reported for
games that offer in-game purchases)**

Apex Legends

Euros spent in-game in the last 12 months



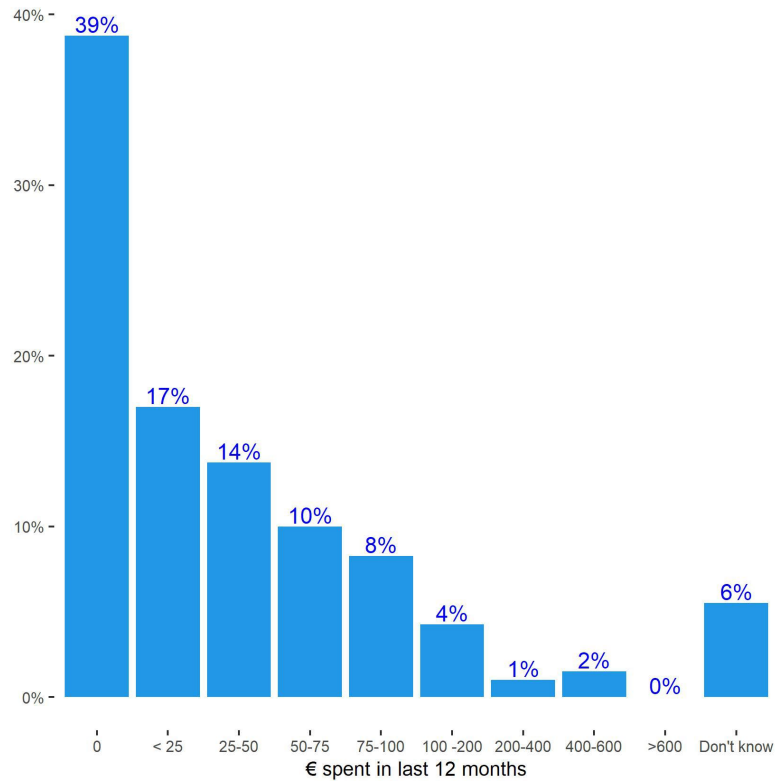
Weekly playtime



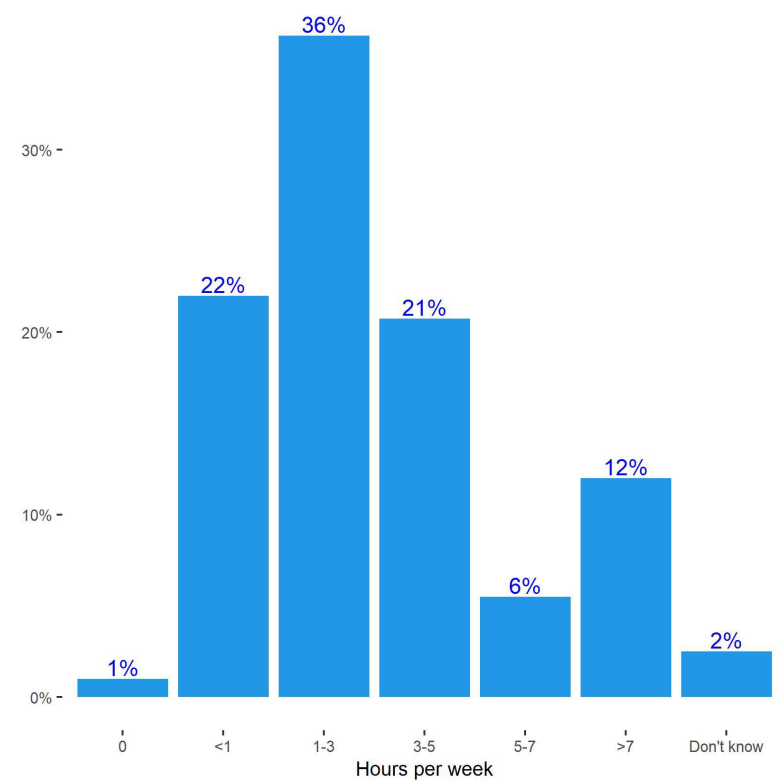
Note : For all the figures on dollar spend the Zloty has been approximated to fit the distribution of Euro

Assassins Creed

Euros spent in-game in the last 12 months

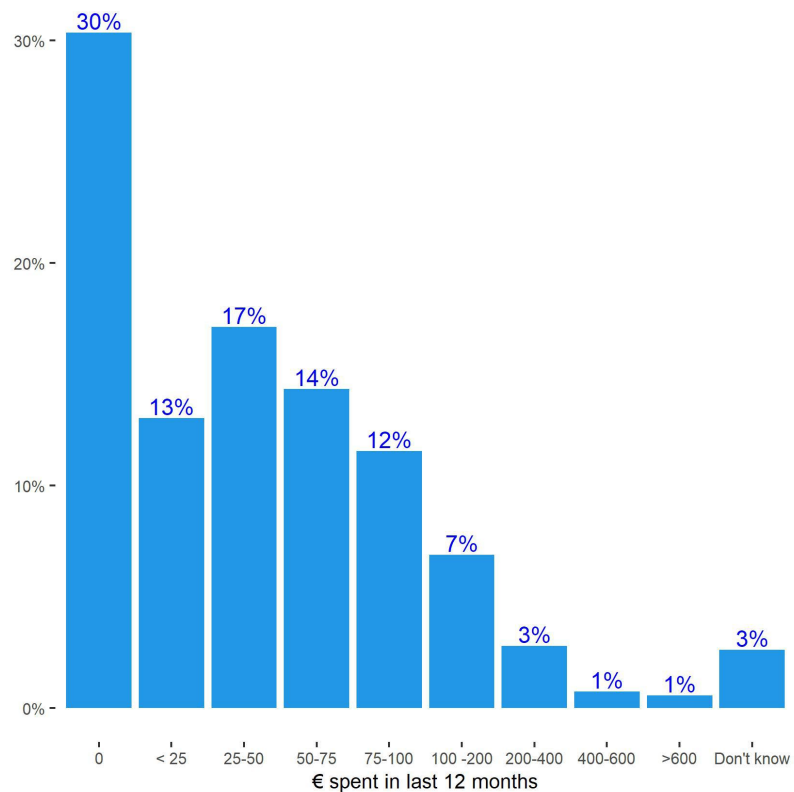


Weekly playtime

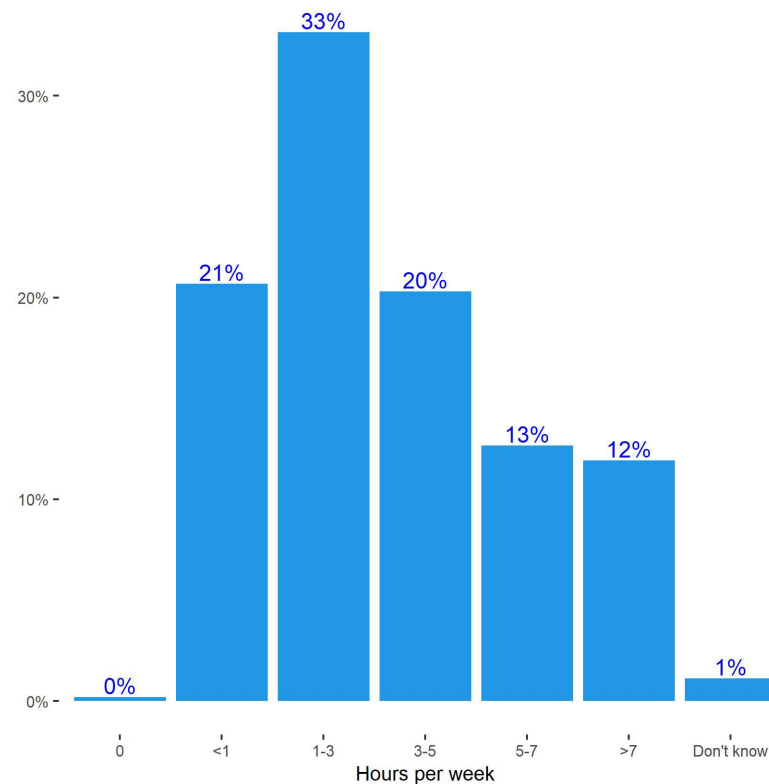


Call of Duty

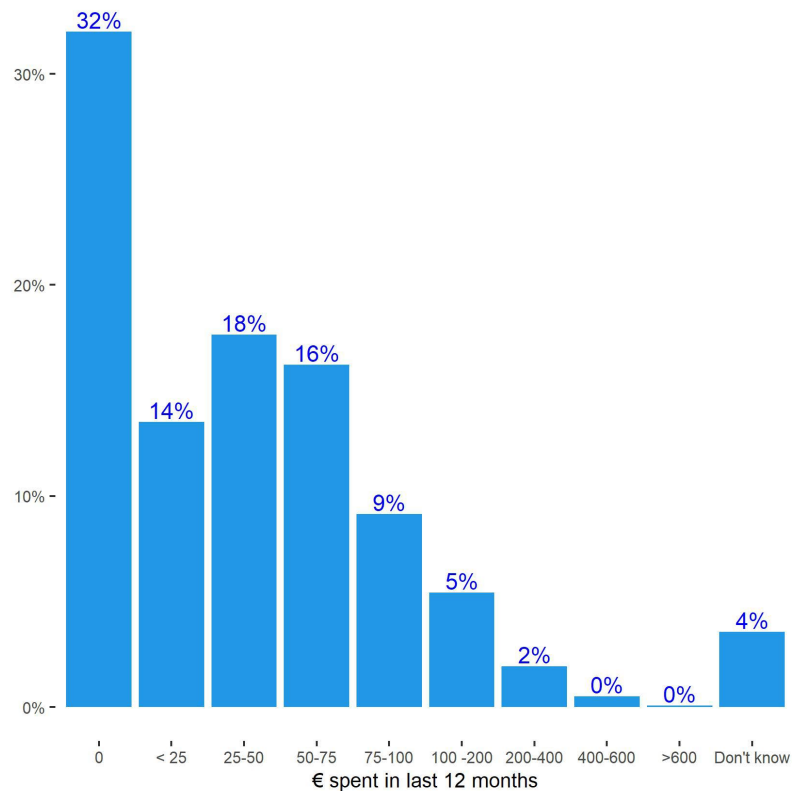
Euros spent in-game in the last 12 months



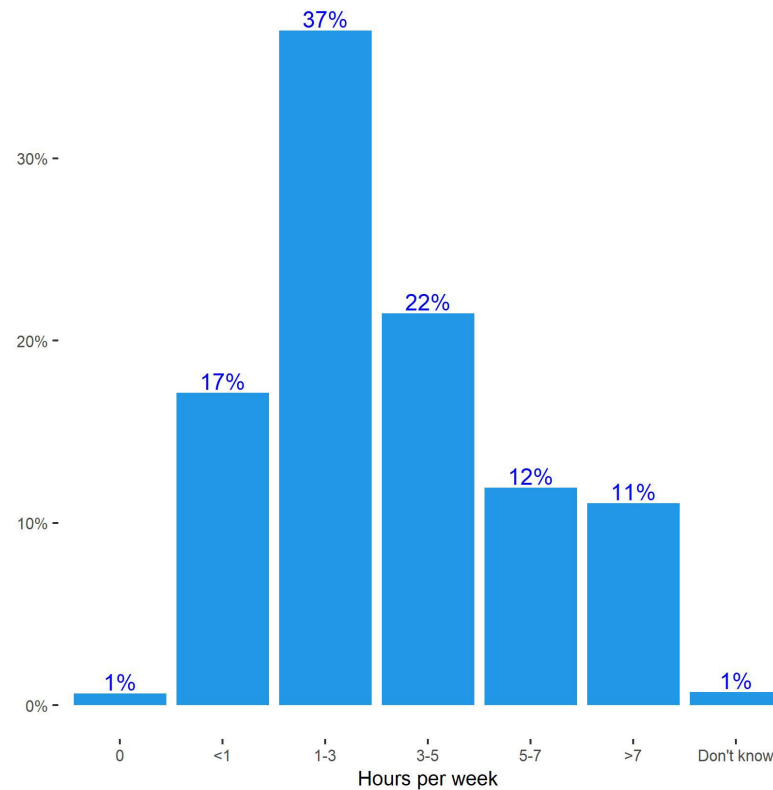
Weekly playtime



Euros spent in-game in the last 12 months

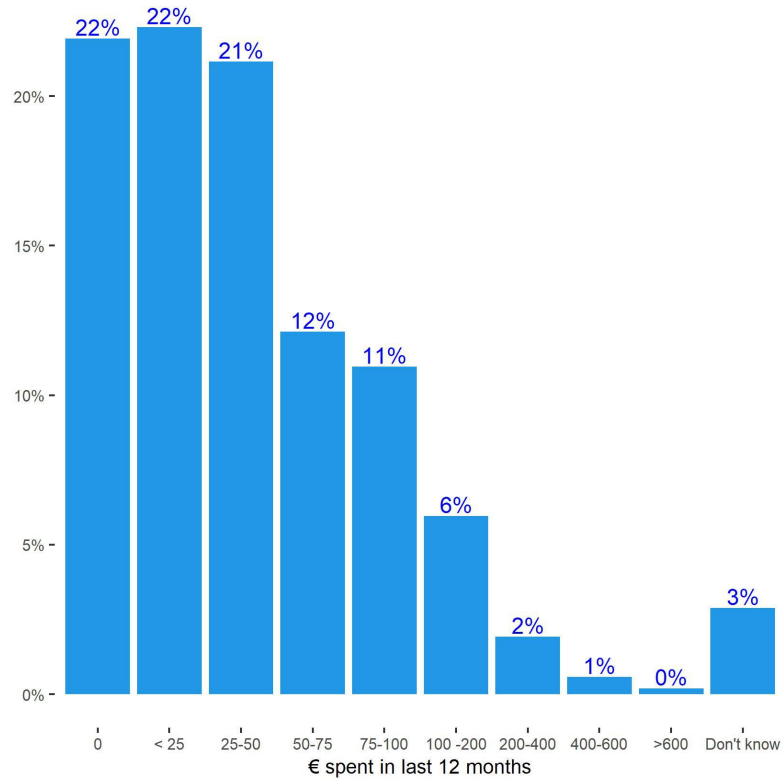


Weekly playtime

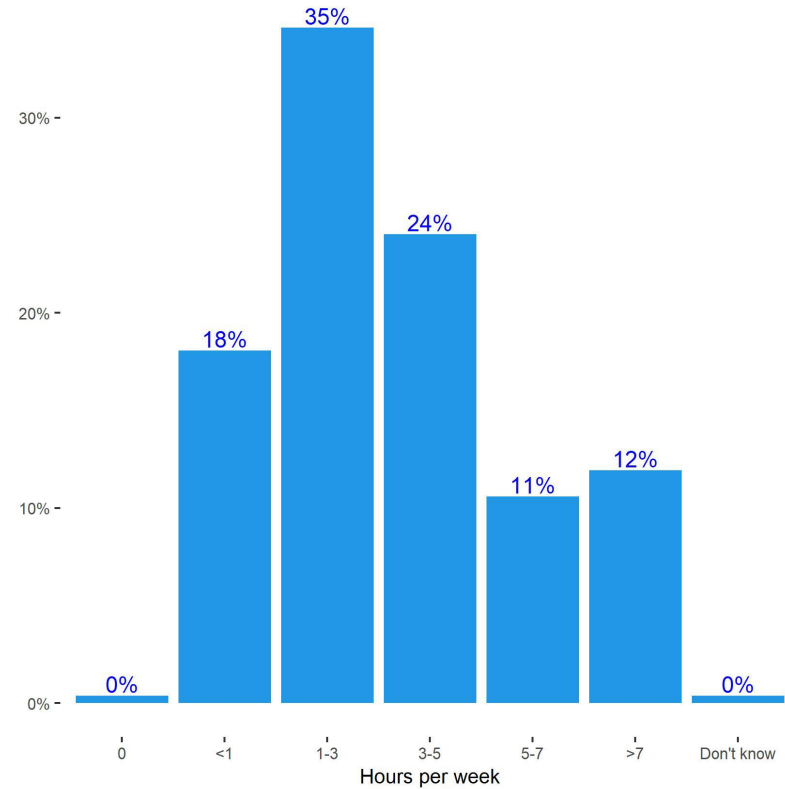


Fortnite

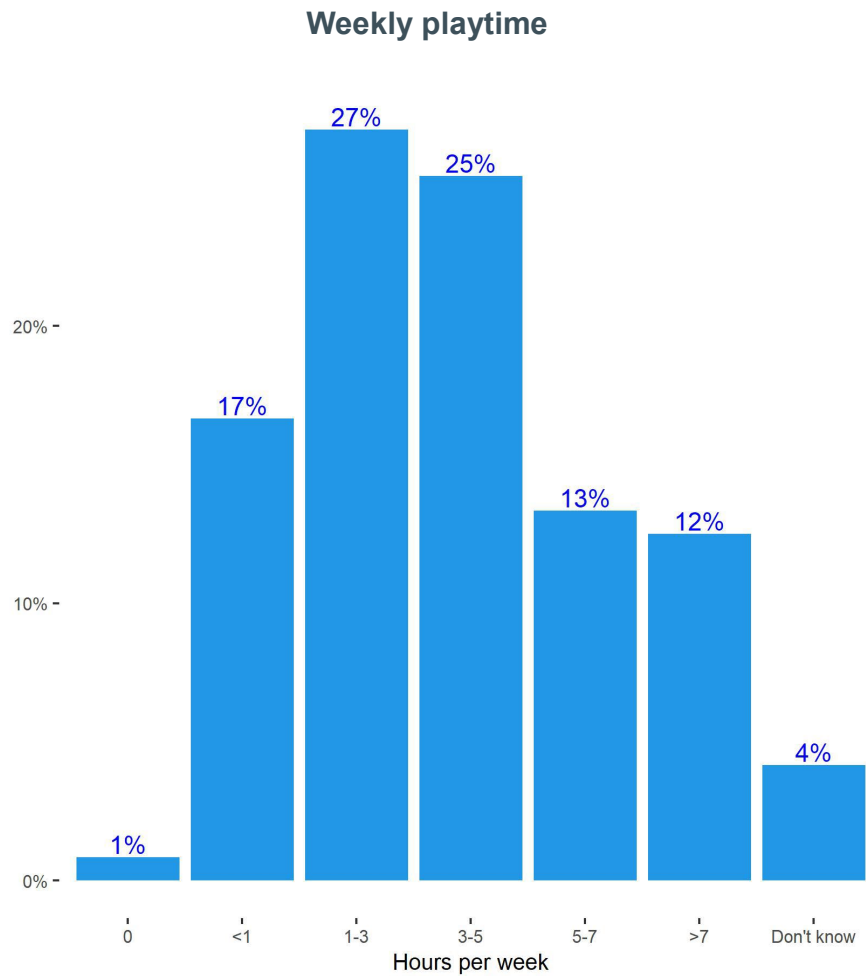
Euros spent in-game in the last 12 months



Weekly playtime

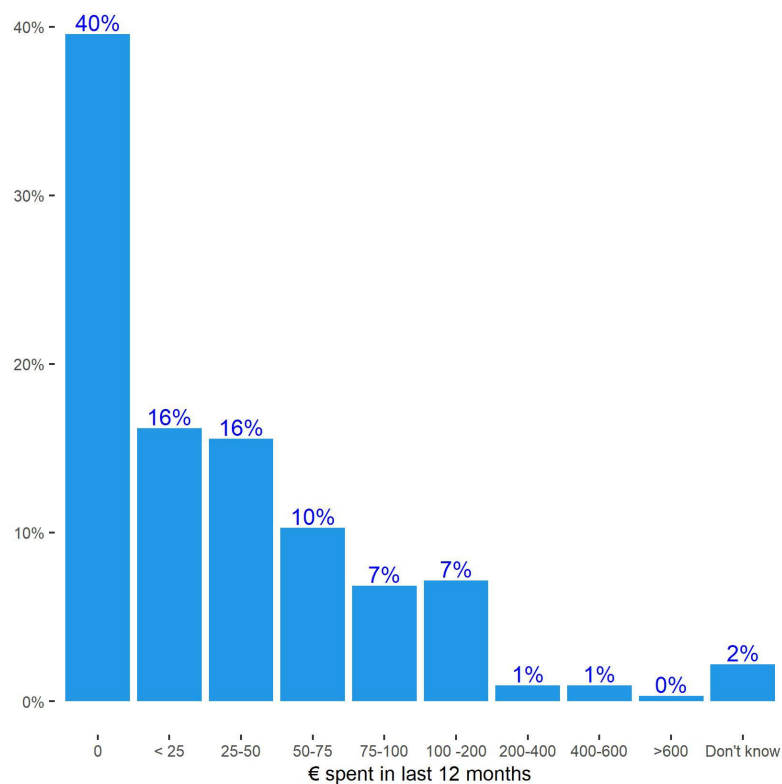


God of War

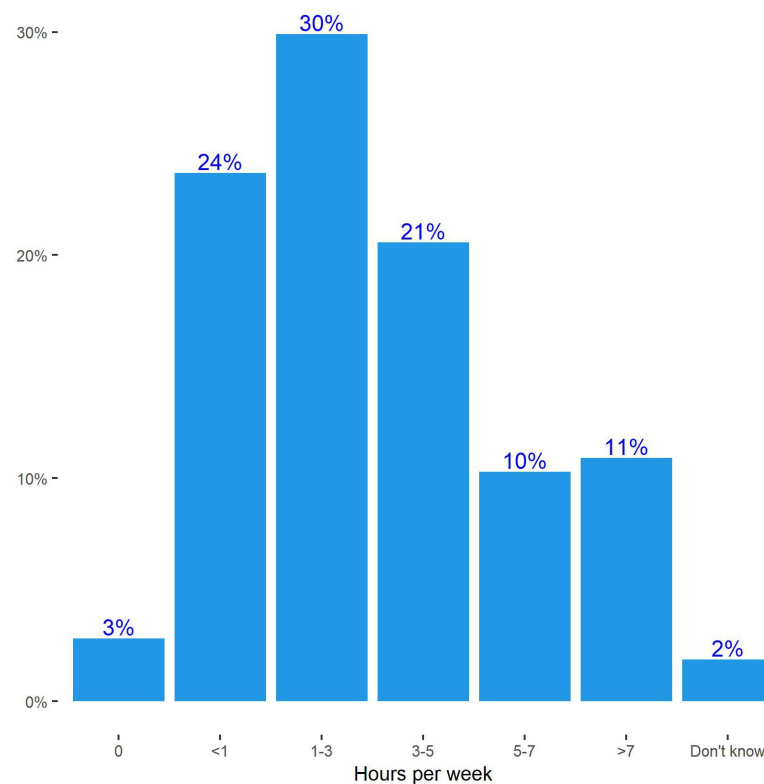


Grand Theft Auto

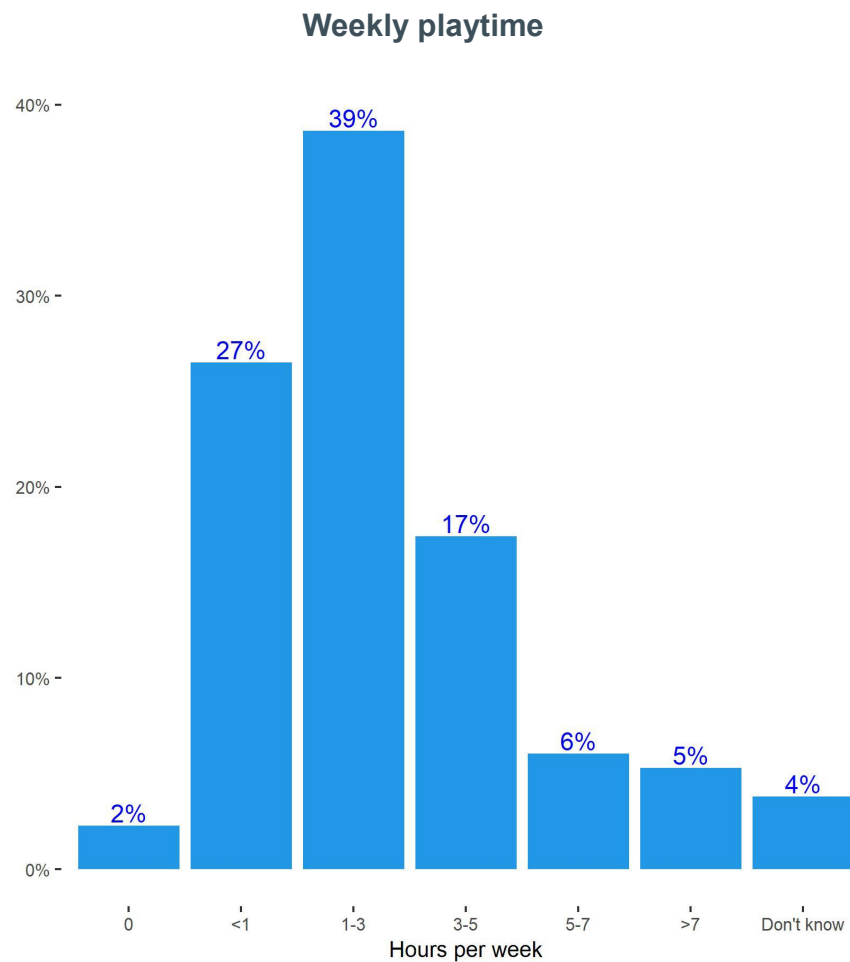
Euros spent in-game in the last 12 months



Weekly playtime

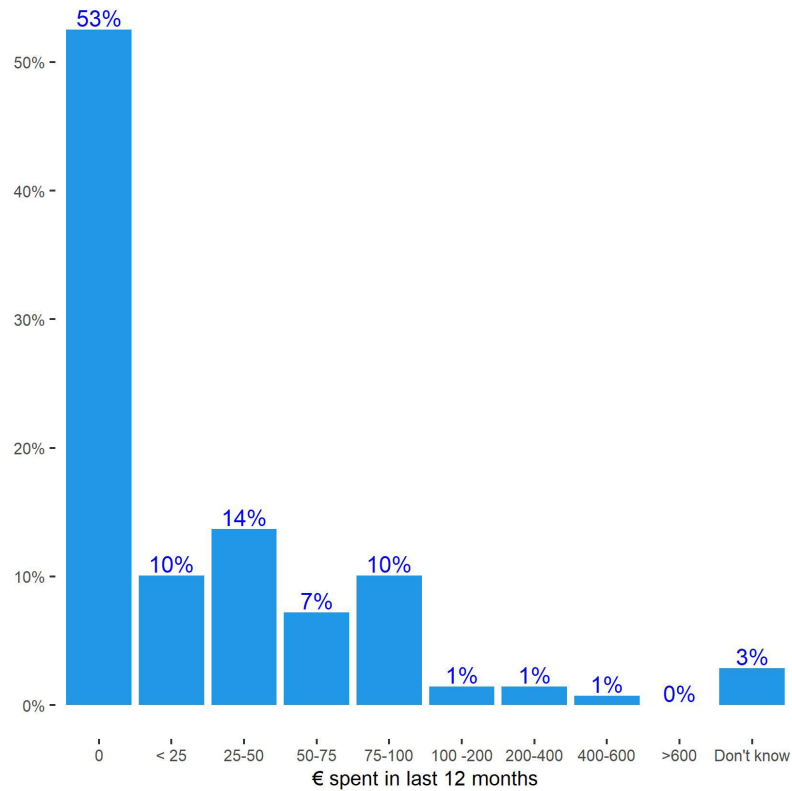


Marvel's Spider Man

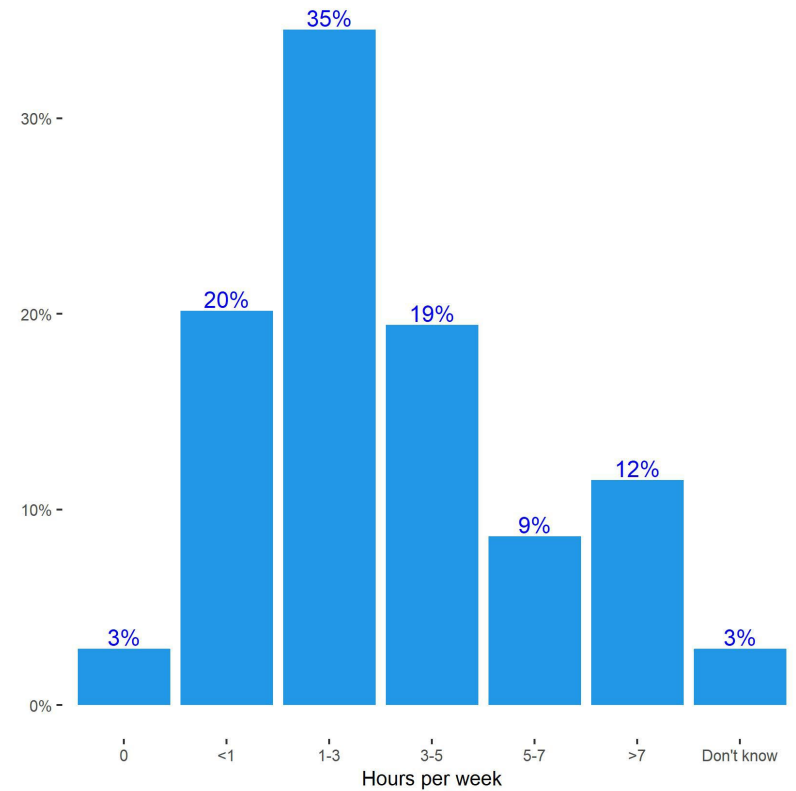


Red Dead Redemption

Euros spent in-game in the last 12 months

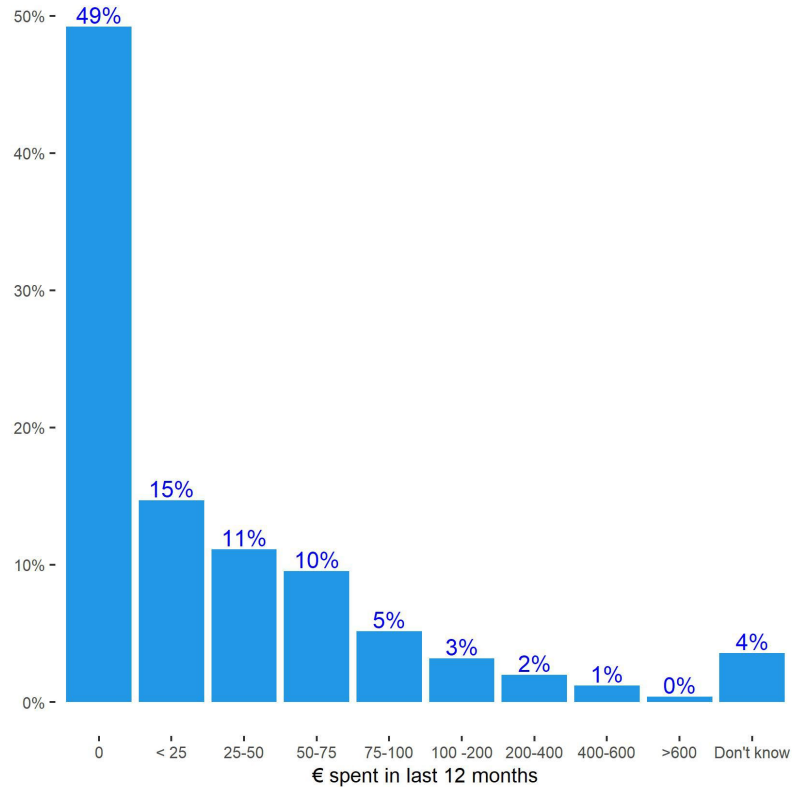


Weekly playtime

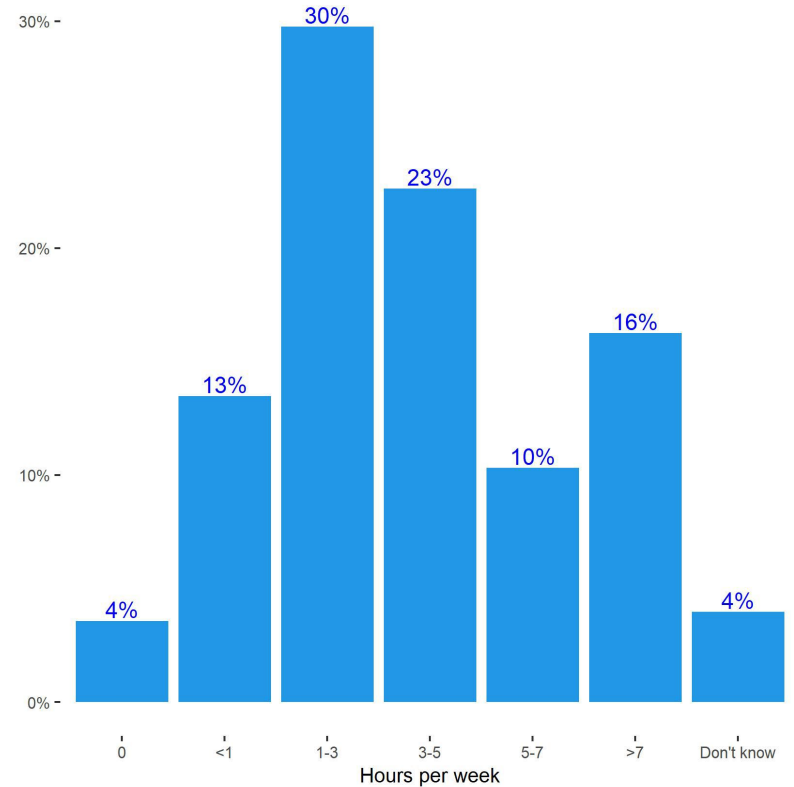


The Last of Us

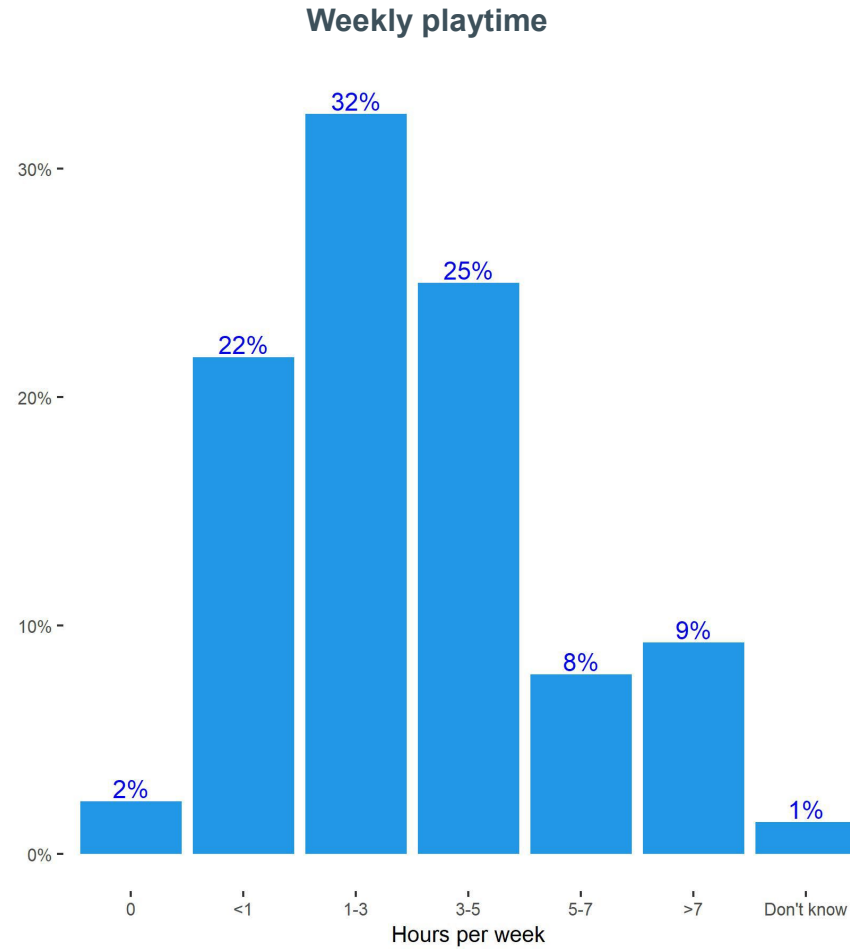
Euros spent in-game in the last 12 months



Weekly playtime



The Witcher



Annex 5 - Demographics

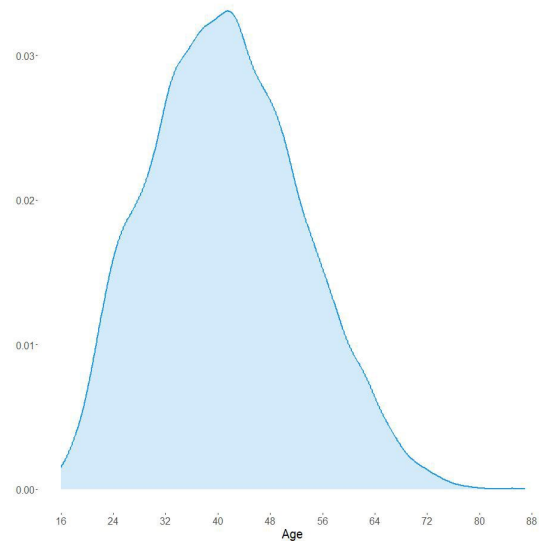
Age and Gender

YouGov provided its own panel of console gamers. The survey did not include demographics questions as this data is stored directly in YouGov’s systems

Gender distribution of respondents

Gender	Share of respondents
Male	54%
Female	46%

Age distribution of respondents



Restricting the survey results to gamers whose age is below 40 or below 35 years has minimal impact on diversion levels for CoD gamers from PlayStation to Xbox.

Age group	Total responses	Share of PS owners that would purchase an Xbox if CoD was not on PS	
		Past diversion	Future diversion
All	7640	3.14%	5.27%
<40	3478	3.13%	5.72%
<35	2295	3.25%	5.9%